

GOALS: ADVANCING AND EDITING FOR THE 2016-2017 PERFORMANCE PLAN

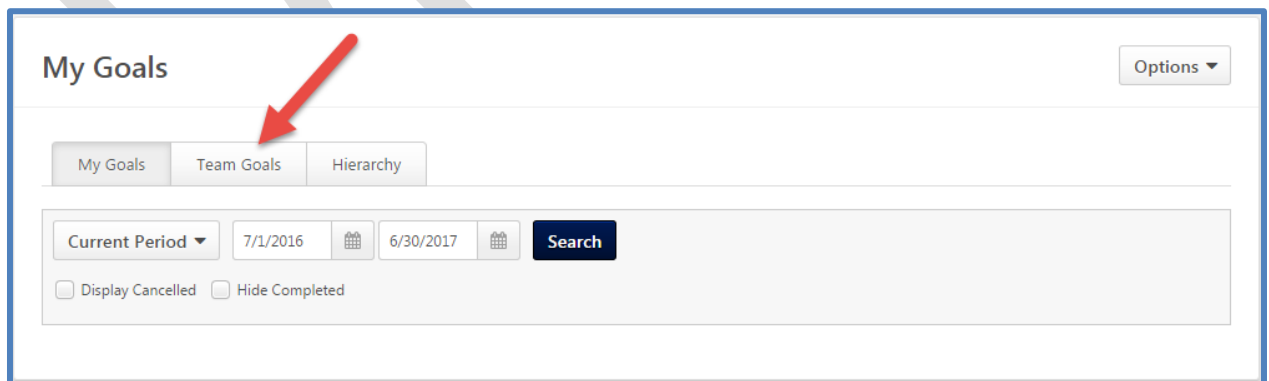
Below are the steps a manager will take to advance and edit (if needed) the goals of their employees to the next performance management cycle year. The DPS Values Goal should **NOT** be advanced.

Before beginning to advance and edit any goals you should have received communication and approved edits from your NCVIP Core Team Representative. **Only approved** edits to goals should be made.

1. Manager/Supervisor: In NC Learning Center: Under the Performance Tab, Click **"GOALS"**.



2. Click the **"TEAM GOALS"** tab. There are no goals here because goals have not been advanced to Current period (FY16-17).



3. Click the **upside down triangle** to reveal the drop down list. Then select **"PREVIOUS PERIOD"**.

The screenshot shows the 'Team Goals' interface. At the top, there are tabs for 'My Goals', 'Team Goals', and 'Hierarchy'. Below the tabs, there is a search bar with a 'Current Period' dropdown menu. The dropdown menu is open, showing options: 'Current Period' (checked), 'Previous Period', 'Last 30 Days', 'Last 60 Days', 'Next 30 Days', and 'Next 60 Days'. A red arrow points to the 'Previous Period' option. The search bar also includes date pickers for '7/1/2016' and '6/30/2017', and a 'Search' button. Below the search bar, there is a message: 'No Goals in the current period'.

4. Click the **>** sign to the right of the employee's name to reveal each of the employee's goals.

The screenshot shows the 'Team Goals' interface. At the top, there are tabs for 'My Goals', 'Team Goals', and 'Hierarchy'. Below the tabs, there is a search bar with a 'Previous Period' dropdown menu. The dropdown menu is open, showing options: 'Previous Period' (checked), 'Current Period', 'Last 30 Days', 'Last 60 Days', 'Next 30 Days', and 'Next 60 Days'. A red arrow points to the 'Previous Period' option. The search bar also includes date pickers for '7/1/2015' and '6/30/2016', and a 'Search' button. Below the search bar, there are checkboxes for 'Display Cancelled' and 'Hide Completed', and a dropdown menu for 'All Statuses'. Below the search bar, there is a list of employees. The first employee is 'John Employee', with a profile picture icon. To the right of the name is a progress bar showing '100% Complete' and 'Total Weight: 100%'. A red arrow points to the right arrow (>) next to the progress bar.

5. Do **NOT** advance the DPS Values for Employees or DPS Values for Managers and Supervisors goals.

Team Goals Options ▾

My Goals Team Goals Hierarchy

Previous Period ▾ 7/1/2015 6/30/2016 Search

☐ Display Cancelled ☐ Hide Completed

All Statuses ▾

John Employee 100% Complete Total Weight: 100%

100% DPS Values for Employees Status: Completed Due Date: 4/14/2016 Perspective: State of NC Weight: 0%

100% DPS4>HR>POD STAFF DEV SPEC III - HRIS>DEADLINES AND METRICS Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

6. Click the **upside down triangle**, then **“ADVANCE”** for the goal that you wish to advance to the next performance cycle.

Team Goals Options ▾

My Goals Team Goals Hierarchy

Previous Period ▾ 7/1/2015 6/30/2016 Search

☐ Display Cancelled ☐ Hide Completed

All Statuses ▾

John Employee 100% Complete Total Weight: 100%

100% DPS Values for Employees Status: Completed Due Date: 4/14/2016 Perspective: State of NC Weight: 0%

100% DPS4>HR>POD STAFF DEV SPEC III - HRIS>DEADLINES AND METRICS Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

100% DPS4>HR>POD STAFF DEV SPEC III - HRIS>PROGRAM MANAGEMENT AND ADMINISTRATION Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

100% DPS4>HR>POD STAFF DEV SPEC III - HRIS>RESEARCH AND ANALYSIS Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

100% DPS5>HR>POD STAFF DEV SPEC III - HRIS>CUSTOMER SERVICE AND COMMUNICATION Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

Context Menu: Edit, Cancel, Advance, View Historical Activity

- Review the **goal template** provided by your NCVIP Core Team Member to determine if edits are needed. **Only edits authorized by your NCVIP Core Team Member should be made.**

Select the appropriate section (1-7) to make the edit(s) which should correspond with the goal template provided to you by your assigned core team member.

Once goal edits are completed or if no edits are needed, scroll down to the Assignment section of this page.

NOTE: Do NOT change the Start or Due Date fields.

Goal Title * 1

DPS4>HR>POD STAFF DEV SPEC III - HRIS>DEADLINES AND METRICS

Goal Description 2

B I S U

Meet assigned deadlines with focus on reduction of agency costs. Maintain metrics of assigned program area(s) as specified.

Start Date

Due Date *

Weight * 3

7/1/2016

6/1/2017

25

Perspective *

Goal Category(s)

State of NC

2 Selected 4

Tasks

		Start Date	Due Date	Weight: 5	Total Weight: 100% 6
	Description: Meet deadlines for requested projects and reports as defined by supervisor.	7/1/2016	4/14/2017	33 %	
	Description: Run NCVIP and LMS reports monthly.	7/1/2016	4/14/2017	34 %	
	Description: Complete required certification related to Leading at All Levels Supervisory Foundations. Attend all modules as a... read more	7/1/2016	4/14/2017	33 %	

Add Tasks 7

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

8. Select **"YOUR TEAM"**.

Attachments
Choose File
Upload up to 3 attachments. Maximum upload 1mb

Assignment *
Select which users or Org Units to which this goal should be assigned.

☐ Yourself ☒ Your team

Cancel **Save as Draft** **Submit**

9. On this screen, you will have the option to assign the goal to every team member by checking the **top checkbox** (1) or assign the goal to just one or select employee(s) by marking the checkbox beside the employee's name (2). Once you have made the selection, click the **"SUBMIT"** button.

Assignment *
Select which users or Org Units to which this goal should be assigned.

☐ Yourself ☒ Your team

1	Name	Title	Direct and Indirect Reports
2	Jane Manager		
	John Employee		

Options
☒ Create a separate goal for each user.

Cancel **Save as Draft** **Submit**

10. Once you click the "Submit" button above, it will bring you back to the goals screen for the current year. Return to **Step 3** to begin advancing the next goal.

FINAL NOTES:

Goals should total 100% for the next cycle year.

Do **NOT** advance the "NC DPS Values for Employees" or "NC DPS Values for Supervisors" goal. These goals will be assigned by the central HR office.

John Employee

DO NOT ADVANCE VALUES GOAL

100% **DPS Values for Employees**
Status: Completed Due Date: 4/14/2016 Perspective: State of NC Weight: 0%

100% **DPS4>HR>POD STAFF DEV SPEC III - HRIS>DEADLINES AND METRICS**
Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%